Core
Concierge

Trainer Guide

4.8
US

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Concierge (1 hr., 15 min.)

Module Overview

Participants will:

- Learn the features of the Concierge system to manage customer reservations
- Practice using Concierge to perform basic tasks
- Practice making reservations for services or events

What Is Concierge? (20 min.)

Learning Objectives

Participants will be able to:

- Explain the purpose of Concierge
- Explain the effects on customers of starting and ending sessions in Concierge

Time	Section	Trainer	Participant Groups
10 min.	What is Concierge?	Lead Trainer	Entire group
10 min.	Demonstration	Lead Trainer	Entire group

Required Materials

- Demo Mac computers with access to www.apple.com and getsupport.apple.com
- An iOS device with the Apple Store app
- An Isaac device with access to Concierge

Instructions

Use the discussion points to introduce Concierge.

What Is Concierge?

- Every day, Apple has an incredibly high volume of customers.
- We meet that demand efficiently when we use the Concierge system to:
    - Manage the high volume of reservations in our store
    - Enhance the customer experience by providing convenience and flexibility
    - Create visibility to the traffic we experience, which helps us staff appropriately
- Through Concierge, teams can be ready to assist our customers at specific times.

Facilitate

1. Explain the journey when customers arrive for their reservations.
2. Explain that Concierge is used in all areas of the store.
3. Explain the importance and effect of starting and ending sessions in Concierge.

Demonstration

Trainer Strategy

- Demonstrate how to create a reservation using:
  - www.apple.com
  - getsupport.apple.com (if accessible in your country)
  - Apple Store app
  - Concierge
- Complete the process for one reservation using the options listed in steps 1 - 3 and the name: Johnny Appleseed.
- Remember the effect on availability in Concierge when you create reservations during this demonstration.

1. Use www.apple.com to create a future reservation.
2. Use Concierge to create a same day walk-in reservation.
3. Use the Apple Store app to create a future reservation.
4. Use getsupport.apple.com to create a repair reservation.
5. View the Workshop schedule, then create an reservation.
6. Using one of the options demonstrated in steps 1–3, create and complete a reservation.
7. Demonstrate how to start and end the session.

Discussion

Lead a discussion using these questions:

- What are the similarities and differences when you create reservations using the different options?
- What's the importance of starting and ending sessions?
- What's the impact on the customer experience if you don't start and end sessions in Concierge?

Guided Tour: Using Concierge (40 min.)

Learning Objectives

Participants will be able to:

- Perform basic Concierge functions
- Collect Information for Data Migration
- Capture Business Introductions
- Explain how Concierge helps support our customers more efficiently
- Explain the importance of accuracy when they use Concierge

Time	Section	Trainer	Participant Groups
40 min.	Use Concierge	Lead Trainer	Entire group

Required Materials

An Isaac device with Concierge for each participant

Instructions

1. Introduce the activity with the key points.
2. For each section, read the Concierge instructions to participants.
3. Ask participants to follow along in Concierge as you guide them through the tour.
4. Explain key points in each feature tour.

Introduction

- Today we'll focus on basic functions in Concierge.
- I'll guide you through a hands-on tour of:
  - Viewing and creating reservations
  - Searching for—and checking in—customer reservations
  - Setting employee availability
- Viewing the Personal Setup queue
- Collecting information for Data Migration
- Capturing Business Introductions
- Viewing the Ready for Pickup (RFP) and Service Non Repair (SNR) list

Viewing Reservations

1. Ask participants to unlock their Isaac device.
2. Ask them to open the Concierge app, then sign in with their AppleConnect ID.
3. Guide participants to view the reservation list.
   - Describe the reservation list, but don't explain each queue in detail.
4. Ask participants to view all reservations.
5. Ask participants to find the demo reservation that you created during the "What is Concierge?" introduction.
6. Explain the process of starting and ending a session in Concierge.
   - Emphasize the importance of starting and ending a session:
     - Traffic management
     - Store communication
     - Being on point
   - Emphasize the importance of collecting better data. The more we know, the better we can support our teams—for example: headcount, tools, and programs.

Creating Reservations

You can use Concierge (Concierge Mobile Admin) to create reservations for customers—for example, when:

- A customer can't access www.apple.com
- A customer doesn't own an iOS device

1. Guide participants to where we create reservations in Concierge.
2. Cite the required information to create a reservation.
   - Name
   - Email address
   - Phone number
3. Explain that an Apple ID is required to create the reservation.
   - Contact details are automatically populated.
4. Explain the value of the various service options, then select Genius Bar.
5. Explain how to enter the reservation's date and time.
6. Explain how to save the reservation and complete the process.
7. Ask participants to make a Genius Bar reservation for later in the week with the demo name and email address.
8. Discuss the importance of accuracy when they create reservations in Concierge, and the implications of creating reservations with inaccurate information.
   - Customers might return at the incorrect time for their reservation.
   - An incorrect service reservation is created.
   - In both cases, a customer likely must wait unnecessarily.

Searching for a Customer

The Search option in Concierge is very useful to diagnose many customer situations.

1. Ask participants when they might use the Search option in Concierge.
   - Listen for and reinforce:
     - The employee can't locate the customer's specific needs in Concierge.
     - The customer can't remember the date or time of the reservation.
     - Customer information is required.
2. Guide participants to Search in Concierge.
3. Ask participants to search Concierge for the demo name: Johnny Appleseed.
4. Review the information:
   - Name
   - Apple ID
   - Email
   - Phone
   - Reservations
   - Memberships
   - Product history—if using Apple ID
5. Use this example of when Search is a relevant option:
   - A customer arrives, but can't remember his or her Apple ID.
6. Use Search to find Johnny Appleseed's Apple ID.
7. Ask participants to search Concierge for the store's name.
8. Review the information available for memberships.

Customer Check-in

- A customer with a reservation arrives in the store.
- The Specialist on point checks in the customer with Concierge.
- The appropriate team is notified that the customer is ready.

1. Ask participants to locate the reservation that they created in the earlier activity.
2. Ask participants to find the option to check that a customer is Here or Late.
3. Explain the green and red flags in Concierge.
    - Green: customer is here
    - Red: customer is late
4. Based on the type of service that the customer reserved, discuss which follow-up action is appropriate. For example:
    - Direct Genius Bar customers to the on point person
    - Direct workshop customers to the workshop presenter
5. Discuss an appropriate customer description:
    - For example—gray hoodie, red backpack at Genius Bar at 11:35 a.m.
        - Clothing (examples: color, type, brand)
        - Accessory (examples: bag, hat, headphones)
        - Location in store
        - Arrival time in store
6. Ask participants what might happen if we mark the incorrect customer as Here.

    Reinforce:
    - A customer misses the reservation because his or her name wasn't called.
    - A customer is called by an incorrect name.
    - A different customer might lose his or her reservation.

Facilitate

- Explain what to do when a customer arrives for an reservation, and it can't be found.
  - Ask the customer how the reservation was made:
    - If the reservation was made as a walk-in, it's not visible in Concierge for Isaac
    - If the reservation was made online or in-store for a future reservation, you can see it in Concierge—and Concierge for Isaac.
    - Could the reservation have been made for a different day, for a different name, or possibly at a different store?
  - Ask the customer for the confirmation email.
  - Check the list of canceled reservations to confirm if the customer was late and the reservation was canceled.

Checking iQueue

Trainer Note

- Emphasize that the priority should always be assisting customers before using iQueue.
- Explain the importance of starting and ending interactions in iQueue.

iQueue helps stores manage the flow of customers during peak times. Using iQueue ensures that customers are paired with Specialists in the order that they arrive. It also ensures that customers receive a warm welcome and are greeted by name.

1. Ask participants to check iQueue in Concierge.
2. Explain the steps in the iQueue process:
    - An employee sees a customer waiting in iQueue.
    - The employee selects Start to begin the interaction.
    - The employee selects End when the interaction is completed.

You'll learn more about iQueue later.

Starting and Ending Sessions

Ask participants why they think starting and ending sessions in Concierge is important.

Reinforce:

- Helps us manage traffic, and know which customers are waiting for Personal Setup and which customers have finished.
- Helps us understand approximately how long sessions are taking.
- Helps us track how many sessions are taking place.
- Provides important data for our leaders to manage the business and schedule staff.

Demonstrate

1. Direct participants to view the Genius Bar appointments that are currently in Concierge.
2. Show participants where to start and end the session, but advise them not to tap on any sessions.

Collecting Information for Data Migration

- When someone buys a new Mac, they often need their data migrated from their old computer to the new Mac.
- Usually, a Technical Specialist performs this service, the migration is handled overnight, and the customer is checked in at the Genius Bar to pick up their devices.
- We'll discuss how to check a Data Migration customer into Concierge, then collect important information about the old computer and the data that the customer wants on the new computer.

1. Ask participants to find the Personal Setup option related to Data Migration.
2. Review the information required to create a Personal Setup reservation for Data Migration:
    - Customer contact details
    - New Mac information
        - Serial number
        - Username and password
    - Current computer information
        - Serial number
        - Username and password
    - Installations
    - Data transfer
3. Ask participants why we require this information
    - Explain the importance of specific and accurate details when you book Data Migration.
    - Explain that Data Migration is available for a standalone sale in EasyPay.
    - Explain the terms and conditions for Data Migration.

Capturing Business Introductions

- Many of our customers use Apple products for their business, and benefit from talking with our Business team.
- Though we should always help customers in the moment, we also want to connect them with our Business team.
- With the customer's permission, you'll create the Introduction by capturing their information in Concierge.

1. Ask participants to find the Business Introduction option in Concierge.
2. Review the information required to create a Business Introduction.
    - Primary Contact details:
        - First name, Last name
        - Email
        - Phone number
        - Business name
        - Business phone number—if different
    - Customer:
        - Title
        - Mode of contact: email or phone
        - Number of employees
        - Type of business
        - How we can help
        - POS receipt number
        - Address
3. Ask participants why they think that entering accurate information in a Business Introduction is important.

    Reinforce:

    - Enables the Business team to identify customers' needs, and prepare accordingly.
    - Ensures that the correct customer is contacted by the Business team.

Customer Scenarios (15 min.)

Time	Section	Trainer	Participant Groups
10 min.	Scenarios	Lead Trainer	Pairs
5 min.	Review	Lead Trainer	Entire Group

Required Materials
An Isaac device with Concierge for each participant

Instructions

1. Don't show the scenarios to participants.
2. Read the scenarios, then ask participants for the solution.
3. Allow participants to use Concierge to determine the appropriate action.
4. Guide participants to the correct Concierge action, if necessary.

Scenario 1

A customer approaches you and says her Genius Bar reservation starts in a few minutes. When you look for her reservation in Concierge, you can't find her name.

Reinforce these actions:

- Use Search to locate the reservation.
- Use Position, Permission, and Probe to learn how the customer made the reservation.
- Create a new reservation, or partner with store teams.

Scenario 2

A customer wants to know whether a repair on his MacBook Pro is complete.

Reinforce these actions:

- Use the RFP List to locate the completed repairs.
- If the repair isn't in the RFP List, politely excuse yourself from the customer while assuring that you'll return with an answer.
- Partner with the Genius Bar team to determine the status of the repair.

Scenario 3

A customer arrives for a Workshop, and wants to browse the store until the session starts.

- Mark the customer as Here.
- Write a description of the customer—for example:,red hat with blue-and-white striped shirt, approximate location, and time arrived.

Review (5 min.)

- In scenario 1 what steps did you take when you could not find the customer's reservation?
- In scenario 2 what steps did you take to locate the status of the customer's repair?
- In scenario 3 the customer was early for their session, what steps did you take to check in the customer?